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ABSTRACT

Prepared as an update of research conducted in 1972 concerning the state of book production in the world, this report provides a wealth of data pertaining to books, book production, and reading. Various sections of the report deal with the following topics: (1) regional and national trends for industralized, deprived, and heavily and under populated areas of the world; (2) books for the newly literate and for children; (3) production considerations; (4) trade in books; and (5) the need for more research. (FL)

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TRENDS IN WORLDWIDE BOOK DEVELOPMENT 1970-1978

by Robert Escarpit

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PREFACE

This document is one of a series prepared as background material for the World Congress on Books, London, United Kingdom, from 7 to 11 June 1982.

The author is Director of the Laboratoire Associé des Sciences de l'Information et de la Communication, C.N.R.S. and Université et de la Communication, C.N.R.S. and Université de Gascogne, Bordeaux 3 in France. He has written a number of well-known studies on books and has long been associated with Unesco's book development programme. The present study was undertaken to update and complement the considerable research undertaken by Professor Escarpit in connection with International Book Year 1972.

The author is responsible for the choice and the presentation of the facts contained in this text, and for the opinions expressed therein, which are not necessarily those of Unesco and do not commit the Organization.

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1. A RETROSPECT

Roughly speaking, the book production of the world as expressed in number of titles has been multiplied by 2.9 between 1950 and 1980. The generally accepted estimate for 1950 is 230,000 titles, while 670,000 titles seems a fairly reasonable estimate for 1980.

Although the number of copies printed is a far more risky guess, one may admit that the multiplying factor is noticeably higher than that which applies to titles: it could be around 3.6, with 2.5 billion copies printed in 1950 and 9 billion in 1980.

In both cases, the rate of increase is significantly higher than that of the world's population which, during the same period, grew from 2.5 billion to 4.5 billion, or a multiplying factor of 1.8. On the other hand, as far as estimates can go, the overall number of literates in the world (children included) would seem to have increased from 1.2 billion to 2.5 billion, which means a multiplying factor of 2.1, still inferior to that of book production, even when it is expressed in titles.

As far as copies are concerned, that figure would mean that the theoretical book availability in the world has increased from 2.1 copies per year and potential reader to 3.9, which is a substantial but not really spectacular advance. Indeed, one may wonder whether the persisting overall imbalance between developed and developing countries is not responsible for an actual diminution of book availability in many of the latter and for what has been termed the 'book hunger'.

The 1965 landmark

Quite differently from most social or economic phenomena, book production seems to have followed a linear progression in the last thirty years or rather a succession of three linear progressions. This means that, during specific periods, it has increased each year by a constant amount and not by a constant percentage, as has, for instance, the world's population whose progression has been geometrical.

Between 1950 and 1962, world book production steadily increased by 10,000 titles a year (1950: 230,000, 1955: 280,000, 1960: 330,000, 1962: 350,000). Then, suddenly, between 1962 and 1965, it increased by nearly 27,000 titles a year (1962: 350,000, 1965: 430,000). Since 1965 the yearly increase is more irregular, but the average is 16,000 titles.

The 1962-1965 'quantum jump' has many explanations. One of them is purely technical and involves a change in the presentation of statistical data in the United States, but it certainly cannot explain such a sudden and violent acceleration which seems to have involved many more countries where no such change had occurred.

Another and certainly more valid explanation is the fact that precisely between 1960 and 1965, quite a number of former colonies obtained their independence and began to have their own book production. Decolonization may have been one of the factors which resulted in the 'book boom' of 1962-1965. The forty-odd nations which became independent in the early sixties and had previously had a negligible book production, accounted by the end of the seventies for about 15,000 titles yearly, a figure which is certainly low compared with the 650,000 titles of the world's production, but cannot be considered as entirely insignificant. The fact is,

however, that decolonization often stimulated book production less in the new nations than in the old colonizing countries which had now to meet the new demands from their former colonies for literacy campaigns or educational development.

Decolonization, then, only partly explains what has been called 'the book revolution' in a study published precisely at that time.[1] There was in that study quite a good amount of wishful thinking. What happened was not actually a revolution in the full sense of the word. The structures of book production and distribution were not fundamentally changed. One of the things which happened between 1955 and 1965 was that the phenomenon of the 'paperback', i.e. of the cheap, large diffusion book, spread from the United States to the other developed countries with a market economy and brought about a number of important modifications in commercial policies and cultural habits. One of those modifications was a change of scale: the book entered the mass distribution and consumption system. That change of scale did not occur in all the countries at the same time. It had begun in the United States, then in the United Kingdom in the fifties. The Federal Republic of Germany and Japan followed in the early sixties, then France and Spain. During the last thirty years, the United Kingdom, the Federal Republic of Germany, Japan, France and Spain have consistently accounted for about 26 per cent of the world's production. Each of them went through a period of sharp increase at some time between 1955 and 1965. Those periods overlapped between 1962 and 1965, a coincidence which explains the 'jump' effect. The total rates of increase of the production by titles during those four years were the following for each country:

United Kingdom	5%
Japan	10%
Federal Republic of Germany	21%
France	61%
Spain	81%

For the five countries, the total rate of increase in four years was 26 per cent (24,000 titles) when it should normally have been 10.4 per cent (9,500 titles).

Apparently, the total extra production evidenced by statistics between 1962 and 1965 amounts to about 65,000 titles. Out of these, about 25,000 can be explained away as non-existent owing to the fact that the United States decided at that time to include in their statistics federal government publications and university theses: out of the 54,378 titles declared for 1965, only 28,595 are in conformity with the previous criteria.

Probably less than 4,000 titles are accounted for by African, Asian and Latin American countries. Although evaluations are particularly difficult with such low figures, it seems that during the 1962-1965 period the production of those countries increased three times as much as during the following period 1965-1975.

The rest of the extra production is to be ascribed mainly to Western European countries which account for three-quarters of the actual increase. In 1962, 15 Western European countries produced 120,000 titles and in 1965, the same countries produced 151,000 titles. Expressed in percentage, the rate of increase was 25.8 per cent while, taking into account the American change in statistical criteria, the world's rate of increase was only 21.1 per cent.

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1. R. Escarpit, The Book Revolution, London, Harrap/Paris, Unesco, 1966.

What seems to confirm that the 'jump' is due to a market economy phenomenon, is that no such a percentage is to be observed in Eastern European countries with a planned economy. Eight of those countries produced 45,000 titles in 1962 and 46,700 in 1965, which means an abnormally low rate of increase of 3.7 per cent. Indeed, only three of those countries (Poland, Czechoslovakia, Yugoslavia) produced more books in 1965 than in 1962, their total rate of increase being barely 18.7 per cent. The USSR produced fewer books in 1965 (76,101) than in 1962 (79,140), with a negative rate of 3.8 per cent, dropping in production for the first time in its history.

The actual meaning of the 1965 landmark remains doubtful. It may well have been an aborted revolution, but it may also have been the mechanical effect of the Western world's economic prosperity during the sixties. The fact remains that the phenomenon had long-lasting effects and that the landscape of book publishing, bookselling and reading has substantially changed during that period in Western Europe.

More prudently, one might also admit that from 1965 on, the tempo of book development has been stepped up the world over. There remains to find out what part Unesco's book development programme had in that change.

The 1972 landmark

The Unesco book development programme was launched by the fourteenth session of the General Conference in 1966. Two years previously, the thirteenth session of the General Conference had stressed the importance of books as means of promoting the Organization's objectives.

In fact, Unesco's action in that field had begun long before. As early as 1955, Unesco commissioned a study of the obstacles which impeded the full production and free circulation of books in the world. The study, which was published by Unesco in 1956 under the title of Books for All,[1] remains a quarter of a century later as enlightening and inspiring as ever. Indeed 'Books for All' was chosen as the slogan of International Book Year 1972 which was proclaimed by Unesco's sixteenth session of the General Conference.

One of the originalities of the work carried out by Unesco during that period was that, for the first time in history, all the activities related to book production, distribution and consumption were implicated in a common project. Authors, publishers, booksellers, librarians, readers were consulted, as well as producers of paper and printing machinery. Besides, an unprecedented effort was made to draw the attention of governments to their political responsibility for book development.

The main effort was directed towards developing countries. Regional meetings were organized for Asia, Africa south of the Sahara, Latin America and Arab countries. Each time, experts were sent to prepare the basic documents for the meeting, and then to help implement the meeting's recommendations.

Regional book centres were created with the purpose of affording to the various countries of the regions both know-how and technical help, and to facilitate regional and interregional co-operation. The centres of Tokyo, Bogotá, Yaoundé and the Unesco Regional Office for Book Development in Karachi have rendered appreciable services to their regions.

1. Ronald E. Barker, Books for All, Paris, Unesco, 1956.

Another line of action was the constant encouragement given to national authorities, ever since the Tokyo regional meeting of 1966, to organize national councils for book development. In 1979, Unesco published a pamphlet which gave excellent practical advice for the organization of such committees or councils.[1] In 1980, about thirty developing countries in the world had national book councils or equivalent organizations. Among the developed countries, the solutions adopted were widely different, ranging from state committees in socialist countries, book directorates as in France, book institutes as in Spain, book boards as in the Netherlands to a variety of professional or cultural organizations like the British National Book League.

One of the main outcomes of the 1972 International Book Year was the proclamation of the Charter of the Book.

The Charter is not an international instrument. Neither Unesco nor national governments were implicated in its preparation or committed by its proclamation. It was separately and then jointly accepted by the International Community of Booksellers' Associations (now the International Booksellers' Federation), the International Confederation of Societies of Authors and Composers, the International Federation for Documentation, the International Federation of Library Associations (now the International Federation of Library Associations and Institutions), the International Federation of Translators, International PEN and the International Publishers' Association.

Even if the Charter did not enjoy all the publicity its promoters might have wished, all the principles it enunciated have been widely taken into account directly or indirectly in the many activities related to written communication which developed in the world since its proclamation. Those principles were the following:

1. Everyone has the right to read.

2. Books are essential to education.

3. Society has a special obligation to establish the conditions in which authors can exercise their creative role.

4. A sound publishing industry is essential to national development.

5. Book manufacturing facilities are necessary to the development of publishing.

6. Booksellers provide a fundamental service as a link between publishers and the reading public.

7. Libraries are national resources for the transfer of information and knowledge, for the enjoyment of wisdom and beauty.

8. Documentation serves books by preserving and making available essential background material.

9. The free flow of books between countries is an essential supplement to national supplies and promotes international understanding.

10. Books serve international understanding and peaceful co-operation.

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1. Abul Hasan, National Councils for Book Development, Paris, Unesco, 1979.

Ten years later, one might be tempted to add a few more principles to meet the demands of a changing world, a problem which was tackled by the 38th session of IFLA's General Council in Budapest as early as 1972. Even so, the Charter has the enormous merit of showing that it is necessary to outgrow the primary slogan of 'Books for All' and to investigate deeper the complex mechanisms of written communication through books.

One of the consequences which may be drawn from the Charter as well as from the lessons of the book development programme, is that, however, generous, the desire to provide developing countries with good and sufficient reading material, which always was the guiding idea of Unesco's policy, cannot be embodied in a single line of action, but splits into a variety of technical, economic and political problems according to patterns which vary from region to region and from country to country.

In 1974, Unesco published a document entitled Anatomy of an International Book Year (Reports and papers on mass communication, No. 71) in which the main points elicited by the recent experience were very aptly stressed.

We have already mentioned two of those points: the necessity for multi-level action and the inadvisability of using a single yardstick to assess the book situation in the world.

The third one is mentioned in the very first paragraph of the document. It is the alarming increase in the gap between demands for reading material and book availability in most of the developing countries. That increase being dramatically stepped up by the counter-effect of spreading mass communication media, it produced in several regions of the world an actual starvation effect. A study published by Unesco in 1973 brought this out clearly.

That study[1] showed that in 1969, 34 countries made up by the countries of Europe, the USSR, the United States of America, Canada, Australia, New Zealand and Japan, produced 81 per cent of the world's production in titles although they represented only a dwindling 30 per cent of the world's population.

One can give now the following tentative percentages for these countries taken together:

	Books (titles) %	Population %
1950	81.2	37
1962	86.8	32
1965	85.2	31
1970	87.4	29
1978	82.4	26

The above figures, in so far as they are accurate and reliable, do demonstrate the importance of 1965 as a landmark, when the emergence of newly independent countries as well as the comparative standstill of Eastern European countries appeared to check for a while the increase of the gap, in spite of the Western European jump. But, however unreliable, they also show very clearly that the aftermath of the book development programme was rather encouraging, since one can observe in the

1. Ronald E. Barker and R. Escarpit, The Book Hunger, Paris, Unesco, 1973.

eight years between 1970 and 1978 an unmistakable trend towards a diminution of the gap. It will however be necessary to analyse further the various factors which combine to produce that trend and those which may be likely to check it.

The new challenges

Since IBY 1972, the world situation has considerably changed. Book development is meeting new challenges. We shall only point out two in this retrospect because their origins are largely historical. One is the exponential development of the new technologies of communication which might prove dangerous competitors for written communication. The other is the new relationship between the industrialized countries of the northern hemisphere and the rest of the world, which tends to replace the former distinction between developed and developing countries by a much more intricate network of interactions in which book policies are in danger of getting lost or being forgotten.

The time is long past since the 'McLuhan scare' led many people in the world to consider radio and television as potential dangers for books. On the contrary, it is now clear that both proved very worthy allies for the promotion of the reading habit. Besides, the number of television receiving sets in highly developed and industrialized countries seems now to have reached a level of saturation which, excepting the United States, ranges from 250 to 400 sets per thousand inhabitants with a yearly rate of increase ranging from 0.5% to 3%. It even seems that the average time dedicated to television watching is sharply decreasing in some countries.

The situation is quite different in developing countries where the use and misuse of new technologies may indirectly act as a brake on book development, inasmuch as they are the result of economic policies which may eventually divert investment choices from written communication towards more sophisticated but perhaps less adapted media. The case of the Ivory Coast is typical. In the early seventies, that prosperous country of Western Africa whose gross national product is one of the highest south of the Sahara, decided to invest in educational television. An elaborate education programme was prepared and very efficiently put into practice. The Bouaké centre remains one of the most impressive achievements in the world by the quality both of its equipment and of its products. Yet, after ten years, the government had to reconsider its policy and felt the need to give a new impulse to written communication which had too long been neglected. As far as the television equipment of the country was concerned, the results were spectacular: the Ivory Coast had 58 receiving sets for 1,000 inhabitants, an unparalleled figure in the region where the average is 6.5. But it was also obvious that the cultural outcome of the experiment, although substantial, did not justify its enormous cost. One of the reasons was that the consequent stagnation of book production and even of newspaper reading attenuated and sometimes nullified the effects of televised education.

An interesting comparison can be made with the neighbouring country of Ghana which has a comparable ethnic and cultural background with a slightly more numerous population and a somewhat lower gross national product. The following table sums up the relevant data for both countries in 1977:

	Ivory Coast	Ghana
Population	7,230,000	10,630,000
Radio sets per 1,000 inh.	155	105
Television sets per 1,000 inh.	58	3.8
Cinema seats per 1,000 inh.	8	1.3

	Ivory Coast	Ghana
Book production (titles)	125	135
Newspaper circ. per 1,000 inh.	13 (1976)	42 (1976)
Printing paper cons. (kg/inh.)	0.58	0.62
Newsprint cons. (kg/inh.)	0.11	0.67
School enrolment (first level)	71%	71%
School enrolment (second level)	44%	51%

One sees clearly that, in spite of its impressive audio-visual development, the Ivory Coast rather lags behind Ghana where written communication is concerned. The difference is particularly visible for newspapers, but it affects books more than the above figures might lead to believe. Ghana has inherited the British tradition of librarianship: its seven public libraries with nearly one million volumes can compare with those of the biggest countries in Africa such as Egypt or Nigeria. Besides, the size of Ghana's editions (an average of 8,200 copies per title) allows a national book availability of nearly one copy a year for three potential readers, a remarkably high figure for Africa.

The French inheritance in the book field for the Ivory Coast was somewhat poorer. In spite of the ability and dedication of the national leaders, their audio-visual choice prevented them from entirely making up for the insufficiencies of their national book production, which implies a higher dependency on developed French-language countries and especially France. This has far-reaching cultural consequences.

The case of the Ivory Coast was a mere example. Many more countries in the developing world are in similar situations. A common pattern applies to most of them: when the investment choices were made pressure was often exerted on them to adopt advanced technologies which may not have been adapted to their situations and increased their dependence on developed countries.

This clearly links up with the second challenge book development is meeting, i.e. the new relationship between North and South and, more specifically, the new demands for a world order of information and communication. Books are the nucleus of any productive information system. To date and presumably for a long time to come, no technology and no 'software', however elaborate, can replace them in their specific role which is to provide individuals with the means of a critical and autonomous production of information, i.e. the weapon of freedom. A communication network which does not include a strong and performing book component, does not carry information but only noises, a perfect camouflage for 'hidden persuasion'. There cannot be any new order of information without a new order of books the world over.

There are no short cuts to individual freedom and book development is a compulsory stage. Of course, developing countries need not follow the erratic way of many developed countries and they cannot afford to repeat their errors. Highly developed countries are not immune to the consequences of wrong investment choices even if their wealth makes the detrimental effect on book development less visible. In a country like France, for instance, the great technological phenomena of the last thirty years, such as audio-visual techniques, computers, satellites and the new 'télématic' have acted as brakes on book publishing and particularly on library development. By the imbalance they produced in public investment they prevented the elaboration of a coherent communication policy in which books could have found their due place, a situation which is evinced by the fact that, in the present government,

books are under the responsibility of the Ministry of Culture and not that of Communication as are radio and television. France is not the only country with such a situation.

Books are part of culture, of course, but they are essentially a vital part of communication. The only way to meet the challenge of the new technologies and of their political implications is to recognize that fundamental fact.

2. REGIONAL AND NATIONAL TRENDS

As stated before, the accepted distinction between developed and developing countries, although useful for global evaluations, is insufficient to account for the multiplicity of the situations and the complexity of the interactions occurring in the world during the last decades of the twentieth century. It becomes necessary to break the figures down to the level of specific regions or even nations.

In the following evaluations, the period considered will be 1970-1978 for which verifiable figures are available. Consequences can easily be drawn for the ten years following the International Book Year 1972.

The privileged

Apparently, the thirty-four developed countries previously mentioned are slightly less privileged than before, as can be seen in the following table which shows their percentages of world figures:

	1970 %	1978 %
Population	29.2	26.3
Book production (titles)	86.6	82.1
Book production (copies)	93.0	89.0
Printing paper consumption	87.5	85.0

The situation thus described allows many contradictory interpretations, especially if other figures are considered. One might stress that the rate of growth of the population of the developed countries (6 per cent in eight years) is much lower than that of book production (16.8 per cent for the titles) or paper consumption (35.1 per cent). Considering that the literate population of the developing countries is rapidly increasing, that would mean that the gap is still widening. On the other hand, it might be pointed out that it widens at a much slower pace than before and that in the last few years, it has been tending to stabilize. The world's book production which grew by 23 per cent in eight years, has risen sharply between 1975 and 1978 and the share of the developed countries in that increase has practically remained at the same level, as is shown in the following table:

	Book production (in thousands of titles)				
	1970	1975	Increase 1970-1975	1978	Increase 1975-1978
World	521	568	47	642	74
Developed countries	451	480	29	527	47
Percentage of increase maintained by developed countries			61.7%		63.5%

Allowing for the imprecision of the statistical data, it may be admitted that the percentage is practically unchanged. Indeed, the above figures, which are those of Unesco's Statistical Yearbook, include China's production in 1978 (12,493 titles) and not in 1970. Our personal evaluation which eliminates the Chinese uncertainty, shows an actual decrease of 0.4 per cent.

One may then admit that the privilege of the developed countries is no longer a monopoly. It would however be a mistake to take the developed countries as a whole without taking into account the different trends which appear among them.

The rate of increase in the number of book titles produced in the developed countries between 1970 and 1978 is approximately 17 per cent in eight years, and it is possible to break down that figure into regions and nations. The following table shows in the first column the rates of increase and in the following two columns the percentage of the total production of the developed countries for each region or nation listed.

	Increase in number of titles	Percentage of total number of titles produced in developed countries	
	1970-1978 %	1970 %	1978 %
Japan	+40.7	7.1	8.4
Union of Soviet Socialist Republics	+22.2	18.0	18.5
Eastern Europe	+20.0	11.2	11.3
United States of America and Canada	+18.4	18.9	18.9
Western Europe	+15.2	43.2	41.8
Australia and New Zealand	-20.8	1.6	1.0

The percentage of increase of Japan is impressive. In fact, that country alone accounts for more than 15 per cent of the total increase of developed countries. Japan's 'book boom' is confirmed by the increase in the number of copies and in paper consumption which both grow by 50 per cent in eight years.

Both the USSR and the Eastern European countries increase noticeably. If one keeps in mind that they remained at a standstill in the mid-1960s, this is quite remarkable. It is all the more so in view of the fact that their book production throughout the thirteen years between 1962 and 1975 had remained practically at the same level. Their 'book boom' is then a rather recent phenomenon and it might have been influenced by IBY 1972 activities in the field of book research and organization.

The North American increase is slightly above average, probably due to the fact that Canadian production has increased from 3,457 titles to 13,190, a remarkable yet quite predictable achievement. The United States grows at a much slower pace than during the 1965-1970 period, but keeps abreast of the USSR. Indeed, that consistent equality of performance between the two giants might raise questions about the nature of their statistics. We already know that the American statistical criteria changed in the 1960s, but we also know that quite a number of Soviet titles are counted several times, since the figures do not relate solely to Russian-language books, but to the cumulated production in the sixty-one principal languages of the Union and about thirty foreign languages. It is then safe to conclude that United

States and Soviet production are both included in the 60,000-70,000 titles bracket, the actual leadership being immaterial.

The diminution for Australia and New Zealand is not really significant. Those two countries, and principally Australia, had experienced a 'book boom' between 1965 and 1970. It is too early to say if the present evolution is a mere levelling off of their long-term growth rate. Figures are too low to allow a reliable estimate. An important point, however, is that in 1978, the share of developing countries in the production of Oceania amounted to a steadily growing 13 per cent.

The conclusion to be drawn from the above remarks is that, after IBY 1972, there has been a reshuffling of the hierarchy of the main book producers in the world. Among those which produce roughly 20,000 or more titles a year, the situation may be summarized for 1965, 1970 and 1978 by the following chart:

Production (in thousands of titles)	1965	1970	1978
80-90			1. USSR 2. U.S.A.
70-80	1. USSR	1. U.S.A. 2. USSR	
60-70			
50-60	2. U.S.A.		3. Federal Republic of Germany
40-50		3. Federal Republic of Germany	4. Japan
30-40		4. United Kingdom 5. Japan	5. United Kingdom
20-30	3. United Kingdom 4. Federal Republic of Germany 5. Japan 6. France	6. France	6. France 7. Spain
10-20	7. Spain	7. Spain	

One sees that the Federal Republic of Germany remains the runner-up of the two 'giants'. Indeed, if one sums up the figures of the Federal Republic, of the German Democratic Republic and of Austria, it is quite clear that books in German pass the 60,000 mark by a comfortable margin.

The great winner, however, is Japan which overtakes its old rival, the United Kingdom, and which, if the present trends persist, may shortly overtake the Federal Republic of Germany

Another obvious phenomenon is the rise of Spain which profits by its increasing domination of the Latin American market. Indeed, it may well have overtaken France in 1978, the figure used for France in the chart being a very approximate evaluation.

Another important remark which may be made is that the seven countries mentioned above account for a rising percentage not only of the world's production, but also of the production of the developed countries, as is shown in the following table:

	1965	1970	1975
	%	%	%
Percentage seven countries/world	46	53	55
Percentage seven countries/ developed countries	61	63	67

One will note that, between 1970 and 1975, the share of the 'leaders' in the production of the developed countries increases more than does their share of world production. This might indicate a phenomenon of polarization around a limited number of great cultural producers. Although slow, this phenomenon has far-reaching consequences inasmuch as it tends to establish the world over the dominion of a limited number of vehicular languages. More books are published in English outside of countries where English is the official national language than are published in the United Kingdom.

A rough estimate shows that the books published in English, Russian, German, French and Spanish (Japanese not being counted for obvious reasons) represented 64.6 per cent of the world production in 1978 while they represented only 59 per cent in 1965. The following table shows the breakdown by languages:

	1965	1978
	%	%
English	20.2	25.3
Russian	17.7	14.8
German	8.8	11.5
French	5.6	7.0
Spanish	6.7	6.0

The spread of English is a well-known phenomenon due partly to the technical, economic and political influence of the United States, and partly to the fact that former British colonies are developing their own book publishing mainly in English. The second factor plays also in favour of French with the added help of Quebec which published 2,651 titles in French in 1978. It does not play however in favour of Spanish, Spain's colonies having long ago gained their independence. If practically unused in the rest of the world, German is one of the main communication languages in Europe where more than 3,000 titles a year are published in German outside the

Federal Republic, the German Democratic Republic, Austria and Switzerland, all of which published 5,934 first editions in German in 1978. Russian also is mainly used in Europe, but in the more limited area of Eastern Europe. Less than 1,000 books a year are printed in Russian outside the Soviet area.

Obviously, the linguistic privilege of a reduced number of nations may in the long run turn into a monopoly, a fact which dangerously threatens the cultural identity of other nations. The situation is particularly preoccupying in Africa where books in vernacular languages are sadly in the minority. In the United Republic of Cameroon, out of 54 books published in 1978, 40 were in French and 14 in English; in Ghana, out of 251 books, 218 were in English, 1 in French, 2 in other foreign languages and only 29 in African languages; in Kenya in 1976, out of 183 books, 121 were in English, 3 were in French, 13 were in other foreign languages and only 46 were in Swahili; in Nigeria, in 1978, out of 1,175 books, 889 were in English and 286 in African languages, which is clearly a better proportion. The example, however, is set by Madagascar which, out of 219 books published in 1978, issued 52 in French, 2 in English, 1 in Spanish and 164 in Malagasy.

The deprived: Africa

It is very difficult to use figures in order to assess the African situation. On the one hand, those figures that are available are too low to allow any reliable evaluation of the variations: for instance, Ghana produced 237 titles in 1976, 135 in 1977 and 251 in 1978, which would imply an inexplicable diminution of nearly one-half of the normal production in 1977. On the other hand, out of 40-odd Unesco Member States in the region (excluding Arab states), statistics were available only for 20 in 1978, 15 in 1970 and 13 in 1965.

Mere editorial accidents may eventually change the figures in quite a misleading way. Taking again the example of Ghana--one of the few countries for which there are enough data for such an analysis--statistics indicate that in 1970, 324,000 copies were printed in that country for 104 titles, i.e. an average of 3,115 copies per title, and that in 1977, 1,114,000 copies were printed for 135 titles, i.e. an average of 8,252 copies per title. It would be imprudent to conclude that there has been an actual increase of 165 per cent. If one looks more closely into the figure, it appears that, out of the 135 titles, a score of religious pamphlets account for 567,000 copies and that the other publications represent a more likely average printing of 4,800 copies per title.

A roundabout way of getting a clearer idea of the situation is to take into account the consumption of printing paper. In the following table, countries are classified according to a decreasing order of printing paper consumption in 1978 expressed in kilograms per inhabitant. The figures for 1970 are also given and variations are indicated by +, - and = when the difference is inferior to 10 per cent of the 1970 figure.

	1970	1978	Var.
Malawi	0.573	2.573	+
Mauritius	0.971	1.699	+
Zimbabwe	1.922	1.480	-
Gabon	0.200	1.119	+
Kenya	0.605	1.098	+
Angola	0.617	0.825	+
Zambia	1.234	0.654	-
Ghana	0.881	0.640	-
Cameroon	0.223	0.584	+
Ivory Coast	0.580 (ev.)	0.579	=

	1970	1978	Var.
Nigeria	0.494	0.451	=
Tanzania	0.384	0.296	-
Ethiopia	0.036	0.152	+
Benin	0.150 (ev.)	0.150	=
Somalia	0.036	0.145	+
Zaire	0.110	0.144	+
Congo	0.168	0.138	-
Liberia	0.107	0.123	+
Senegal	0.745	0.112	-
Central African Republic	0.125 (ev.)	0.100 (ev.)	-
Mali	0.070 (ev.)	0.059	-
Uganda	0.265	0.040	-
Chad	0.027	0.025	=
Niger	0.025	0.020	-

A number of book-producing countries, like Botswana, Guinea, Madagascar, Mozambique, Sierra Leone, were not included for lack of up-to-date data. Besides, a correction should be applied in the case of Senegal where newsprint consumption seems to have compensated for printing-paper consumption. In that country the yearly newsprint consumption grew from 0.113 to 0.932 kilograms per inhabitant, while printing-paper consumption dropped from 0.745 to 0.112. This may be due to the use of newsprint for the printing of publications classified as books.

In order to interpret the table, one must bear in mind that the average yearly consumption of printing paper in the world is 8.5 kilograms per inhabitant and that in the region it is 0.4 kilogram per inhabitant. Out of the 24 countries included, 11 are above average and 13 are below average. On the other hand, 10 countries increased their consumption, 10 diminished it and 4 remained stable. One will also notice that, among the above-average consumers, 6 increased their consumption, 2 remained stable and only 3 diminished, while among the below-average consumers, only 4 increased, 2 remained stable and 7 diminished. This all too clearly points to a trend which is to be met the world over, but is particularly preoccupying in Africa: a tendency to polarization towards a number of countries which, for historical, political or economic reasons, have had the possibility of crossing the threshold between total dearth and mere poverty.

But paper consumption is only an indicator and should be taken prudently. From quite another standpoint, some of the indications are confirmed by the very able analysis of the book situation in the region made in a recent Unesco publication, The book today in Africa.[1] That study brings to light the main two obstacles to African book development, which are, on the one hand, the economic dependence of the book trade on developed countries, and, on the other hand the political and cultural division of Africa.

Even the best planned government initiatives often fall under the control of publishers from the former colonizing countries and more favour importations than national production. Thus, the Ghana Publishing Corporation and the Zambian Kenneth Kauda Foundation have signed agreements with Macmillan & Co. Ltd, which, although having had some positive effects on regional book availability, have practically placed the book market in the hands of the British publisher. The Nouvelles Editions

1. S.I.A. Kotei, The book today in Africa, Paris, Unesco, 1981.

Africaines initiated by Senegal and the Ivory Coast, in which five major French publishers are minority partners, extend their influence over most of the former French colonies of West Africa. They have proved efficient enough for the provision of reading material in French, but much less so for the promotion of African authorship and publishing. There are, besides, many 'expatriate publishers' from America and Europe who have established with similar effects branch companies in Africa, such as Evans Brothers, Heinemann Educational, Longman, Nelson, Oxford University Press, Macmillan or Hachette's Editions Saint Paul.

S.I.A. Kotei forcefully stresses the harmful effect of importations on indigenous publishing, especially when they come as donations, however well-meaning, such as those from the United Kingdom (British Council), the United States (International Communication Agency) or the Soviet Union. Textbooks are particularly affected: 'The pedagogic system has remained resolutely British or French or Spanish, as was the case before decolonization. What is more, the methodology, style and academic references preferred by African teachers correspond to those of metropolitan universities'.[1] And the author concludes with this pointed remark: 'The only thing that will definitely change dependence on foreign multinationals is, as in the Sudan, adoption of an indigenous language as the medium of communication'.[2]

It may not be the only remedy, but it certainly is part of the cure. But then, Sudan is an Arabic-speaking country and it can afford to publish practically two-thirds of its books in Arabic. The problem is that all African countries south of the Sahara are multilingual and that the vehicular languages from Europe are spoken only by minorities. This points to the advisability of publishing books in lingua franca, i.e. in one of the African vehicular languages which were evolved from the necessities of trading and current intercourse. Such is Swahili which is spoken in most of East Africa and in part of Zaire. Tanzania, where Swahili is the national language, prints in it one-half of its production. Kenya also publishes books in Swahili as mentioned above. One may safely estimate at about 300 the number of Swahili books now published yearly in the region.

The only equivalent of Swahili in Western Africa could be Hausa, a northern Nigerian language which has long been used for trading from the Sahel to Cameroon, but it is far from having the currency of Swahili. Fulani, a Senegalese language which also spreads as far as Cameroon, could equally serve the purpose. So could Bambara and other languages of the Mandingo group in the north-east of the region: a newspaper in Bambara, Kibaru, launched in 1972 with a scanty investment, has appreciably improved the reading situation in Mali. One must not ignore either the rising Ewe and Yoruba literatures in Ghana, Togo and Nigeria: in those cases an effort has been made to unify the various dialects. Such an effort which could be conducted through schools and radio, should obviously be extended to the whole region in order to make more manageable the multiplicity of languages. Minority languages and ethnic identities should not suffer from the choice of a limited number of widely spread languages for the purpose of written communication in the region and in the subregions.

The many: Asia

Asia cannot be treated as a whole. Representing more than one-half of the world's population, it includes first of all two subcontinents, China and India: more than one man out of five is Chinese and more than one out of seven is Indian.

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1. Ibid.
2. Ibid.

It also includes a highly developed country which is one of the giants of book publishing, Japan, which has already been dealt with. In addition, Hong Kong, Singapore and the Republic of Korea, with more modest living standards, are bridgeheads of the developed world which finds there cheap skilled manpower and has invested in equipment. In light of the size of their populations, their book production is comparable to that of most European countries.

In the west, the Arab states of Asia Minor are dealt with as a separate region along with those of Northern Africa, but, around the Mediterranean, a number of countries of the Near East which technically belong to Asia, are culturally much more akin to Europe. Those Asian-European countries are Cyprus, Israel and Turkey. They are all fairly important book producers.

The other countries of the region are characterized by vast differences in cultures, political institutions, standards of living and sizes. They include Afghanistan, Bangladesh, Bhutan, Burma, Democratic Kampuchea, the Democratic Republic of Korea, Indonesia, Iran, the Lao People's Democratic Republic, Malaysia, Mongolia, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Viet Nam. Their common denominator is need. Some of them figure among the poorest in the world. Their total population is far superior to that of the whole of Europe and their total book production is far inferior to that of Spain. Yet, unlike most African countries, they all have an ancient tradition of written culture. They currently use for written communication at least 20 age-old languages from 5 different stocks in more than 15 different writings ranging from the Latin or Arabic alphabets to scripts derived from Devanagari or Chinese characters.

1. China

Few reliable figures are available for China prior to 1976. Our personal estimate for 1965 was 50,000, but it seems to have been exaggerated. Officially, China had published 2,507 titles in 1952, a figure which is probably an underestimation.

The available data for 1978 are summed up in the following table:

	Titles	Copies (thousands)	Copies per title
Human and social sciences	1,736	299,610	172,586
Education, leisure, travel	919	275,030	299,271
Science, engineering, trade and transport	3,474	253,240	72,895
Arts, literature and linguistics	1,750	131,390	75,080
Children's books and textbooks	4,674	2,606,890	557,742
TOTAL	12,493	3,566,160	285,462

The most striking feature is of course the size of the editions which is justified by the size of the population. A book availability of 3.8 copies per inhabitant is not particularly striking: it approximates, for instance, that of Poland. A more original feature, however, is the fact that Chinese authorities aim at maximum efficiency with a low number of titles and large printings for each. That could become a weakness if allowed to take priority over full utilization of the enormous intellectual resources of the country. Standardization may help to trigger book development, but it may also check it in the long run.

An interesting indicator which shows that large printings are part of a long-standing planned policy in China, is the growth of printing-paper consumption, which was 905,800 metric tonnes in 1965, 1,138,000 metric tonnes in 1970 and 2,244,400 metric tonnes in 1978, an increase of almost 100 per cent in eight years, unequalled in the subregion.

Another striking feature is the importance given to children's books and text-books which represent one-third of the titles and two-thirds of the copies. There are about 300 million pupils in Chinese schools of the first and second level, which means a quite satisfactory book availability of 8.6 books a year per child. China is thus giving full priority to the promotion of reading in the younger generation.

Two points must also be stressed about China: the effort made in favour of linguistic minorities and the use of the Latin alphabet (pinyin) to facilitate the early acquisition of the reading habit.

2. India

The case of India is more preoccuping. The production of books seems to show a decreasing trend:

1965:	13,094	titles
1970:	14,145	"
1976:	15,802	"
1977:	12,885	"
1978:	12,932	"

The diminution affects most categories, but more particularly applied sciences: 2,139 in 1976, 911 in 1978. The trend is confirmed by the very low rate of increase of printing-paper consumption: +17.8 per cent between 1970 and 1978 (+62.8 per cent for the region, excluding China).

That is all the more surprising as India is one of the countries in the world where efficient book development planning has been conducted and which has been most instrumental in organizing activities both national and regional during International Book Year. India has a national book development council and other organizations, like the National Book Trust or the Southern Languages Book Trust, have been successful in the publication of low-cost books. There are also in India experienced private publishers and well-trained librarians. The distribution network is insufficient, but it has improved in recent years. The Home Library Plan inaugurated in the 1960s by a Delhi publisher has given encouraging results in the rural areas of Uttar Pradesh.

One of the reasons of India's stagnation is obviously the low standard of education. The 1971 census showed 66.6 per cent of illiterates in the total population and 73.6 per cent in the rural areas. The same year, 72.2 per cent of the total population had had no schooling, with 78.6 per cent in the rural areas. In 1977, school enrolment in the first level (5-9 years) still represented only 79 per cent of the age-group population with a total enrolment of 70,149,960 pupils. It also must be stressed that illiteracy and lack of schooling principally affected women who are often, in many countries, the best propagandists for reading. Projections allow to think that the reading population of India, counting children, must have amounted to hardly more than 200 million potential readers.

Such a bulk could be a sizeable book market if it was homogeneous. Apart from enormous economic disparities, there are innumerable differences in religion, customs, modes of life, environment, cultures and especially languages. There are in India 22 widely spoken languages out of which 16 are Aryan (akin to Sanskrit) and 6 Dravidian,

each having practically its own script. There is little in common, as far as reading requirements go, between a Delhi Brahmin, a Bengali intellectual, a Tamil worker from Madras, a Kerala expatriate and a Bihari peasant. English is better accepted than Hindi as a national vehicular language by the Dravidian-speaking populations. Tamil particularly is efficiently promoting its vernacular production which can be read in some parts of Sri Lanka and Burma. Out of the 12,932 books published in India in 1978, 4,393 were in English, 2,179 were in Hindi and 6,360 in other languages. Out of those books, only 864 were textbooks and 466 were children's books. Those are rather low figures although the Children's Book Trust of Delhi and the Southern Language Book Trust have made worthy efforts to promote the publication of multilingual editions. India even organized a Children's Book Fair in 1979, during the International Year of the Child.

The weakness of India and its wealth is its human size and diversity. The solutions to its book problems cannot be but political solutions. Only a global development policy can allow Indian publishers, educators and librarians to reap the reward of their meritorious efforts before and after IBY 1972. India is too big for outside help, and it will have to draw the remedies from its own resources.

3. The bridgeheads

There is little to say about Hong Kong and Singapore. Out of the 3,041 books they published in 1978, 1,262 were in English, 1,534 were in Chinese, 89 in Malayan, 10 in Tamil and other languages. One characteristic of both countries is that the number of pamphlets as compared to books is very high. In Hong Kong, actual books only represent 54 per cent of the titles and 39 per cent of the copies, with an average of 3,800 copies per title. In Singapore, they represent 68 per cent of the titles and 59 per cent of the copies, with an average of 4,600 copies per title. This, of course, leads us to revise slightly our former comparison with European countries. Both countries favour social sciences, but, as could be expected, a large proportion of the pamphlets are dedicated to education and leisure. Both countries also are fairly important producers of children's books and textbooks. Hong Kong produces yearly 155 titles and 692,000 copies of children's books (average printing: 4,464) and 200 titles and 3,765,000 copies of textbooks (average printing: 18,825). Singapore produces 99 titles and 687,000 copies of children's books (average printing: 6,939) and 115 titles and 2,150,000 copies of textbooks (average printing: 18,695). The main difference between the two countries is their consumption of printing paper: Hong Kong consumes slightly more paper per inhabitant than Singapore (25 kilograms a year against 21). Both entirely rely on importations.

The Republic of Korea has a well-balanced production with more than 25 per cent of literary texts, a particularly high ratio. The average size of the editions is 4,262 copies per title. For literary texts, it is barely 1,000. But the most striking feature is the growth of book production since 1970 when it was only 4,027 titles against 16,364 in 1978. Printing-paper consumption confirms that trend since it has increased in the same time from 0.724 kilogram a year per inhabitant to 5,777.

4. The Asian-European countries

Cyprus, Israel and Turkey could quite normally be counted among the European countries. There are, however, differences which are manifest in their consumption of printing paper.

With a steady, yet slightly decreasing consumption of 11.5 kilograms a year per inhabitant, Israel responds to European standards. Its 2,214 titles in 1977, out of which 1,919 were in Hebrew, and its 11,166,800 copies may seem a lowish score for a wholly literate country which counted then 3,611,000 inhabitants, but it must be

remembered that an important part of the population reads foreign books in European languages. This, in time past, has been a serious obstacle to the development of Israeli publishing in Hebrew, when the generation of the post-war immigrants often preferred to read in their native languages: between 1950 and 1965, Israel's production only grew from 822 to 1,038 titles a year. The difficulty seems now overcome. In 1977, Israel published for the young 'sabras' 197 titles and 2,870,000 copies of textbooks (average: 14,568 copies per title) and 231 titles and 2,438,000 copies of children's books (average: 10,554 copies per title).

With a yearly consumption of 5 kilograms of printing paper per inhabitant, Cyprus approaches the level of some of the less affluent countries of Europe. Its production has steadily grown during the last 30 years and particularly in the years following IBY 1972. It was 205 titles and 330,000 copies in 1970 (average: 1,610 copies per title) and in 1977, it had grown to 570 titles and 2,127,000 copies (average: 3,732 copies per title). Its book availability now approaches European standards: 3.5 copies per inhabitant each year. In 1977, the production of textbooks (60 titles, 348,000 copies, with an average of 5,800 copies per title) and of children's books (42 titles, 45,000 copies, with an average of 1,071 copies per title) was impressive for such a small country. A multilingual nation, Cyprus has multilingual publishing: out of the 570 titles of 1977, 373 were in Greek, 102 in English, 36 in French, 32 in German, 16 in Russian and 11 in other languages.

Astride over Europe and Asia, Turkey has a yearly paper consumption which is nearer the Asian standards: 1.5 kilogram per inhabitant. Few detailed data are available on its production which seems to be growing regularly: 2,100 titles in 1950, 4,083 in 1964, 5,840 in 1970, 6,830 in 1977. Social sciences represent nearly two-thirds of the production. Applied sciences and literature both rank rather high, around 15 per cent of the production each, but about one-half of the literary books are translations. A somewhat risky evaluation for the copies printed could be around 50 million, which would mean an average of 7,000 copies per title and a book availability of 1.2 book a year per inhabitant, not an altogether unlikely figure in a country where the percentage of illiteracy is still considerable.

5. Other Asian countries

Data are available for 12 more Asian countries only. Their total production in 1977-1978 seems to have amounted to about 20,000 titles and probably 200-250 million copies.

Iran also has a fine tradition and represents one of the most promising hopes for book development in Asia. Its production grew from 391 titles in 1954 to 985 in 1965, 1,381 in 1970 and 3,027 in 1978, which is a most impressive advance in the post-IBY period. The production included an increasing number of textbooks (36 titles in 1977) and children's books (173 titles in 1977). It is too early to say what the effects of the Islamic Revolution are going to be. Even prior to the proclamation of the Republic, the consumption of printing paper had declined sharply. There is every reason to believe that Iran will remain a leading book producer in the region, for it has both know-how and resources.

Neighbouring Afghanistan is quite different. Illiteracy is very high and school enrolment is still low. Afghanistan produced 108 titles in 1965 and 232 in 1978, but in 1976 it only produced 64 with a printing of 3,072 copies and special emphasis on sciences, literature and textbooks. Although the consumption of printing paper is very low (0.1 kilogram a year per inhabitant), it seems to show a slow upward trend.

Prior to the independence of Bangladesh in 1971, Pakistan already was a promising book producer. The efforts of the National Book Council, of the professional organizations of authors, publishers and librarians, were rewarded by a production which

reached 2,027 titles in 1965 with a printing of more than 5 million copies. Pakistani production had much in common with that of India, with the added advantage that there were only two leading national languages: Urdu in West Pakistan, Bengali in East Pakistan. There was, however, a serious imbalance between the two languages in favour of Urdu.

The balance is now better. With almost equivalent populations, Bangladesh published 1,229 titles in 1978 and Pakistan published 1,317. Although the actual figures are not known, there still may be some imbalance in the number of copies printed. In 1978, Pakistan consumed 40,100 metric tonnes of printing paper (0.516 kilogram per inhabitant), while, Bangladesh consumed only 18,700 metric tonnes (0.234 kg per inhabitant).

There are some striking differences in the content of the books produced. Bangladesh's production is more 'scientific' than Pakistan's as is shown in the following table:

	Pakistan %	Bangladesh %
Religion	19.6	9.2
Social sciences	11.9	32.5
Pure sciences	0.1	16.0
Literature	40.6	17.2
History and Geography	14.8	7.2

Both countries are self-sufficient for intellectual production and publish few translations. In 1977, Pakistan published 183 children's books, which is rather high.

East of the Indian subcontinent, 6 countries of different sizes seem to have profited by the impulse given after IBY 1972 and have noticeably increased their production, while one, the Lao People's Democratic Recpublic, seems to be on a downward slope: 119 titles in 1965, 57 in 1970, 31 in 1976.

For the other 6 countries, Brunei, Indonesia, Malaysia, Philippines, Sri Lanka and Thailand, the global production which was about 8,000 titles a year in the 1960s, had dropped to 5,800 in 1970 and risen again to more than 10,000. The following table gives the detail of the figures for 1978 or 1977:

	Population	Titles	Textbooks	Children's books
Indonesia (77)	145,100,000	2,265	832	262
Philippines (77)	46,357,000	1,735	120	20
Thailand	45,100,000	3,390	157	22
Sri Lanka	14,846,000	1,405	65	51
Malaysia	12,960,000	1,328	212	152
Brunei	201,000	32	13	1
TOTAL	264,058,000	10,155	1,399	508

All these countries have made headway since 1970, except Sri Lanka which seems to be at a comparative standstill. Its paper consumption even diminished by 25 per cent and is now about the same level as that of Indonesia, slightly more than 0.6 kilogram a year per inhabitant. Sri Lanka is meeting the same multilingual problem as the Philippines and Malaysia.

Out of the books published by Sri Lanka in 1978, 55.8 per cent were in Sinhala, 16.4 per cent were in Tamil, 21.5 per cent were in English, 6.3 per cent were in other languages. In the Philippines in 1977, 43.1 per cent were most unequally divided between the three national languages, English, Tagalog and Spanish, while 57.9 per cent were in other languages, among which some of the 7 vernaculars spoken, along with Tagalog, by 90 per cent of the population. In Malaysia in 1978, 47.0 per cent of the books were in Malay, 35.1 per cent were in English 17.9 per cent were in other languages, Chinese (spoken by 30 per cent of the population) included.

An independent British protectorate in the island of Borneo, Brunei is the smallest Asian book producer, but by no means the least efficient. With 94 titles in 1977 and 32 in 1978, an average of 4,500 copies per title, a book availability which varies around one copy a year per inhabitant and a yearly paper consumption of 1.3 kilogram per inhabitant, it compares most honourably with the other Asian countries.

Thailand has an old tradition of book publishing, probably due to its long-standing status of independence. In 1950, it already published 4,444 titles and was the most important producer of the subregion. Then, a downward trend was observed until 1970 (2,085 titles). After IBY 1972, Thailand thanks to an intelligent and efficient policy, has regained most of the lost ground. Being linguistically homogeneous, it does not meet the same difficulties as its Southern neighbour, Malaysia. It favours educational books (22.2 per cent), linguistics, law, political science, religion and engineering. Its production of textbooks is one of the best in Asia and it has a fair production of children's books.

Last but not least, Viet Nam is the only country of the region which offers a developing version of the socialist countries' book canons. After 30 years of a devastating succession of wars, the cultural merging of North and South Viet Nam is a slow process. The former has brought to the reunified country much of its publishing know-how. In 1977, Viet Nam had a well-balanced production of 1,504 titles and 64,807,000 copies, which implies a printing of 43,089 copies per title, a figure which would appear to be midway between Soviet and Chinese standards, with a book availability of 1.3 books a year per inhabitant, still a low figure which is confirmed by the poor consumption of printing paper: 0.387 kilogram a year per inhabitant.

In fact, these figures are misleading. Choices had to be made and the Vietnamese Government very sensibly gave top priority to the reading needs of the younger generations. One-half of the titles and two-thirds of the copies published in Viet Nam in 1977 were school textbooks, while 76 titles and 5,182,000 copies were children's books, which means for both huge printings of over 60,000 copies per title. Even if only 696 titles and 1,218,000 copies were destined for general adult reading, those are encouraging figures and one must bear in mind that many books classified as school textbooks or children's books, serve for adult reading.

6. General remarks

A recent Unesco study entitled Promoting national book strategies in Asia, stressed the complexity of the Asian situation in which many parameters combine into a variety of patterns. The consequence is that 'while only generalizations are possible in a regional context, the situation may be more difficult or less comfortable in specific cases. Each country will therefore have to assess its own problems and work out its own solutions. Because book publishing in the region is

directly or indirectly related to, or dependent upon, several government agencies, no book development strategy can succeed without substantial subsidy and sustained support by the state'.[1]

Another consequence is the necessity to give top priority to investigation and research into the reading habits and tastes of different categories of people with a multidisciplinary approach and to promote reading motivation campaigns especially in the under-20 age-group which represents almost half the total population.

The people and the book: the Arab states

The situation of the Arab states is more preoccupying. Although their printing-paper consumption has slightly increased from 1.3 kilogram a year per inhabitant in 1970 to 1.6 in 1978, their book production still represents a dwindling 0.9 per cent of the world's production for 4.8 per cent of the world's population. It has increased by a scanty 20 per cent in eight years.

Truth to say, these evaluations are not quite reliable. There are few regions in the world where so few and sketchy data are available. The following table gives the available data for the last thirty years in numbers of titles:

	1950	1965	1970	1978
Algeria	101 (53)	131	289 (68)	-
Egypt	654 (53)	3,355	1,872 (69)	1,472 (77)
Iraq	248 (53)	268 (64)	515	1,618
Jordan	-	-	114	392 (76)
Kuwait	-	113	104	50
Lebanon	396	373	594	-
Morocco	100 (52)	161 (61)	-	-
Qatar	-	-	99	159
Sudan	-	83 (63)	-	104
Syria	-	458	-	230
Tunisia	56 (53)	200	134 (69)	85
United Arab Emirates	-	-	-	15

There are no data available for Libya, Bahrain, Oman, Yemen, Democratic Yemen and Saudi Arabia. Besides, although not technically included in the Arab states, Mauritania should be counted here with a production of 71 titles in 1976 and 40 in 1977.

Few deductions can be made from that table except perhaps the effects of the new wealth derived from oil production. Ever since the 1960s, Kuwait had made it a policy of using oil revenues for cultural purposes: with a somewhat erratic but always high title production, it printed 232,000 copies in 1978 for an almost entirely literate population of 1,119,000. Qatar and the United Arab Emirates seem to have followed suit, the former printing 371,000 copies in 1978 for a population of 201,000 and the latter 82,000 for a population of 711,000.

1. Abul Hasan, Promoting National Book Stategies in Asia and the Pacific--Problems and Perspectives. Paris, Unesco, 1982. (Studies on Books and Reading, No. 4.)

But the most striking fact is the rise of oil-producing Iraq, formerly a medium-size book producer, which overtakes Egypt, once the main book provider of the Arab world. All the other Arab countries seem to be affected by a downward trend except Jordan which printed 2,673,000 copies in 1976, mainly social and pure sciences.

A table of printing-paper consumption will complete and help to interpret the above data. The figures are those of the consumption in kilograms per inhabitant. The variations are indicated by +, - and =.

	1970	1978	Var.
Algeria	3.158	1.221	-
Bahrain	1.860	5.435	+
Egypt	1.410	2.355	+
Iraq	1.886	0.872	-
Jordan	0.300	0.557	+
Kuwait	9.078	18.083	+
Lebanon	9.518	8.058	-
Libya	0.682	2.933	+
Morocco	0.793	0.736	=
Qatar	7.595	13.861	+
Saudi Arabia	1.091	1.399	+
Sudan	0.284	0.431	+
Syria	1.153	1.840	+
Tunisia	-	2.768	
Democratic Yemen	0.279	0.366	+

Those figures confirm the preceding observations concerning oil-producing countries. Libya particularly makes a most spectacular advance. We can only lament that the lack of data prevents us giving the attention deserved to the efforts of the Libyan Government in the field of book development. In Algeria, for which recent data are also missing, in spite of the policy of 'Arabization' in schools, French remains a leading vehicular language and national publishing can hardly compete with French publishing. Unlike the Arab countries of the East, the Arab countries of the Maghreb still have strong cultural ties with the former colonial power. In Tunisia, for instance, at least one-half of the national production is in French.

Although the Arab-speaking countries represent 150 million people with a school enrolment of 26 million pupils and students and a receding rate of illiteracy, Arabic has not been able to regain the status it had in the Middle Ages as a great international vehicular language. Only 0.4 per cent of the books translated in the world come from an original in Arabic, while some Arab countries such as Syria translate up to 12 per cent of their production from European languages.

One bright point is evidenced by the following table which gives the known data for textbooks and children's books:

	TEXTBOOKS		CHILDREN'S BOOKS	
	Titles	Copies	Titles	Copies
	Year		Year	
Egypt	455 (77)	23,350,000	56 (76)	4,001,000
Iraq	148 (78)	-	26 (78)	-
Jordan	- (77)	3,175,000	49 (76)	833,000

	TEXTBOOKS (contd.)		CHILDREN'S BOOKS	
	Titles	Copies	Titles	Copies
	Year		Year	
Kuwait	4 (77)	173,000	-	-
Qatar	111 (78)	232,000	-	-
Sudan	88 (77)	10,386,000	15 (77)	150,000
Syria	1 (78)	2,000	11 (78)	38,000
Tunisia	69 (78)	2,651,000	10 (77)	93,000

These figures mean that the countries which represent the greatest part of Arab production devote about 40 per cent of the books they publish to children, a comforting thought indeed. One must particularly stress the effort of Sudan where school textbooks are all printed by the Government Printing Press in Khartoum. Again considering the above figures, one may conservatively estimate textbooks and children's books in the whole Arab world to about 60 million copies a year. Considering that the population from 5 to 14 is slightly over 40 million, the overall ratio seems encouraging but yet insufficient.

There are in fact enormous economic disparities among and inside the Arab countries which have significant repercussions on the book industry and will not be overcome without a determined regional policy.

The New World: Latin America

Latin America is not so new to book publishing: printing shops were established more than four centuries ago in Spain's American empire. Most Latin American countries have claimed their independence long before any other colonial possessions and some have old and respectable literary tradition.

The newness lies in the consequences of an unprecedented demographic explosion, of an extremely rapid economic evolution and of deep social and political changes.

The following table gives the evolution of the number of titles published since 1965:

	1965	1970	1978
Argentina	3,539	4,812	4,627
Barbados	-	-	216
Bolivia	-	104	339 (76)
Brazil	4,812 (64)	6,392 (69)	20,025 (76)
Chile	1,497	1,370	432
Colombia	-	-	1,272 (76)
Costa Rica	13 (63)	284 (69)	24
Cuba	615 (63)	995 (69)	1,039 (77)
Dominican Republic	-	-	48 (76)
Ecuador	-	-	31 (76)
El Salvador	75 (63)	39 (69)	144
Guyana	-	-	97
Guatemala	90 (63)	-	84 (76)
Honduras	189 (62)	-	30 (76)
Jamaica	40	159	143

	1965	1970	1978
Mexico	4,851	4,812	4,851 (76)
Netherlands Antilles	-	-	52 (77)
Panama	-	132	126
Peru	927	885	968
Trinidad and Tobago	-	-	18 (76)
Uruguay	141	-	481 (76)
Venezuela	743	-	257 (77)

Haiti, Nicaragua and Paraguay are missing from the list which is fairly complete.

Three outstanding facts emerge from those figures, especially from those for 1978 and the immediately preceding years.

First and foremost is the rise of Brazil which now ranks among the world's main producing countries almost at the level of France and Spain. The fact is confirmed by its paper consumption which represents 44 per cent of the region's consumption against 37 per cent in 1970. In eight years, the consumption per inhabitant has grown from 2.797 kilograms a year to 6.236 kilograms, a figure which compares with European standards. Brazilian editions are sizeable: 11,100 copies per title, for a country of 116 million inhabitants. Textbooks accounted in 1976 for 4,906 titles and 99,868,000 copies (average: 20,356 copies per title) and children's books accounted for 2,421 titles and 36,863,000 copies (average: 15,226 copies per title). Another important feature of Brazilian production is the number of books published in Spanish: 1,025 titles in 1976, which may be an indication of the part played by Brazilian publishing in the book market of the other countries of the region, which are all Spanish speaking.

One of Brazil's winning cards is, of course, the enormous supply of pulpwood it can hope to draw from the Amazonian forest in the future. In 1978 it was still dependent on importations for its paper consumption by only 15 per cent although that consumption had almost doubled in eight years. But the spectacular growth of its production in recent years is due on the one hand, to the know-how and spirit of enterprise of the Brazilian publishers, and on the other hand, to the intelligent and systematic efforts of the Brazilian authorities.

The second fact which emerges from the figures is the apparent stagnation of medium-size traditional producers like Argentina, Cuba, Mexico, Peru and the downward trend of Chile. In fact, two exceptions must be made for Mexico and Cuba.

Mexico's population grew from 50 million in 1970 to 67 in 1978, an increase of 34 per cent when the world's population increased by only 18 per cent. One-half of the population is under 15, and in eight years the enrolment of first-level schools almost doubled. Every year those schools have to receive an <u>added</u> number of pupils which is equivalent to the <u>total</u> enrolment of Hungarian schools and far superior to that of Belgian schools. One can easily imagine the problems created by such a situation for book publishing. Jaime Torres Bodet once said that his country was like that of Alice, where 'it takes all the running you can do, to keep in the same place'. Although Mexico has important material and intellectual resources and a fine tradition in book publishing and librarianship, it has to face an unprecedented mass phenomenon: the book industry and the distribution network cannot adapt to a mass situation as fast as the needs of the population increase.

Since 1970 efforts have been made to cope with both manifest and latent needs. The Comite para el Desarrollo de la Industria Editorial y Comercio del Libro helps the government implement a new and inventive policy. One of the most striking

initiatives was a nationwide operation which aimed at using primary-school teachers not only as agents for the promotion of the reading habit, but also as relays for book distribution. The success of the policy is shown by the fact that Mexico's consumption of printing paper is maintaining itself at about 7 kilograms per inhabitant although the total consumption has increased by 50 per cent between 1970 and 1977.

The case of Cuba could be compared, mutatis mutandis to that of Viet Nam: it is a socialist country coping with development problems. The campaigns to fight illiteracy in Cuba have been won and the level of education is high. For many years, the Instituto del Libro has led a well-planned policy which can now develop in many directions. Cuban editions have large printings, an average of 31,033 copies per title in 1977. As could be expected, both textbooks and children's books are favoured: 534 titles and 18,877,000 copies for the former (average: 35,350 copies per title), 72 titles and 3,999,000 copies for the latter (average: 55,541 copies per title). Cuba's printing-paper consumption (for which it is largely dependent on importations) is now well above 5 kilograms a year per inhabitant.

The third and perhaps most important fact which the figures show, is the emergence of small countries. Twelve of them, 5 of which are Caribbean islands, now produce nearly 900 titles which represent a printing of more than 1 million copies with a population of about 34 million inhabitants. Although the ratio may seem low, it still is creditable. In fact, Barbados, Jamaica, Netherlands Antilles and Trinidad and Tobago alone account for one-half of the production for a population of barely 3,800,000 inhabitants.

All these countries publish either textbooks or children's books or, more generally, both. A special mention must be made of El Salvador where the Ministry of Education published 6 textbooks and 10 children's books, all first editions, in 1978. Forsaking the 'castizo' Spanish, the children's books use the people's speech, strongly tinged with vernacular, certainly an interesting initiative. The effort of Jamaica also deserves to be noted: in that country, particular care has been given to the production of books and pamphlets adapted to new readers.

On the whole, the balance of Latin America after IBY 1972 is rather positive in spite of the continued pressure exerted by co-publications and importations from Spain and of the comparative stagnation due to political disturbances in some countries.

Mention must be made of the Regional Centre for Book Development in Latin America and the Caribbean (CERLAL) in Bogotá which was certainly instrumental in the progress achieved by the smaller countries of the region. Established in 1971, under an agreement of international co-operation between Unesco and the Colombian Government, CERLAL has been active in organizing meetings and seminars, promoting research and in providing advisory services to various countries.

The few: the Pacific islands

Apart from Australia and New Zealand which rank among the privileged, Oceania has been witnessing the new phenomenon of the development of publishing in the islands of the Pacific which have not hitherto appeared in the statistics. Some are not actually independent countries, but they tend more and more to act as autonomous communities and to promote their own local book production.

American controlled Guam and East Samoa published in 1978, 31 titles and 86 titles respectively, most of which were scientific books in English. French Polynesia published 12 titles in 1977, mostly scientific: 7 were in French, 4 in Tahitian and 1 in Spanish.

Independent Samoa published 240 titles in 1977, none of which was in the field of literature. Ninety-one were in English, 62 were in Samoan, 6 were bilingual and 19 were in other languages. The Fiji Islands published 12 titles in 1976. The Tonga Islands published 210 titles in 1978. In 1977, they had published 510 out of which 68 were in Tongan and the rest bilingual English-Tongan. None of them was in the field of literature. Other Pacific islands published 41 titles in 1978. Twenty-seven were in English, 7 in Palavan and 6 bilingual. All dealt with social sciences and 12 were mere pamphlets for school use. Even the outlying Norfolk Island, with its 2,000 inhabitants, published 1 social science book in 1977.

The population of Oceania, excluding Australia and New Zealand, is hardly more than 4.5 million inhabitants and it is scattered over hundreds of islands. Accordingly, the sizes of the editions ranged from 200 to 1,600 copies per title towards 1978. That is rather a creditable result. Although data on the consumption of printing paper are lacking for most countries, the case of the Fiji Islands is quite significant of the progress made in late years. In these islands, the per capita consumption rose to 3.268 kilograms in 1978.

Another creditable fact is the increasing use of vernacular languages for publishing purposes. One can estimate that nearly 1,000 titles--often, truth to say, simple pamphlets--are published yearly in the various Polynesian languages.

The ignored: ethnic minorities

Statistics prepared by national governments often ignore minority languages. For example, there are few official figures for Catalan, Basque, Occitan and Breton books, although those cultures have an age-old publishing activity and account for quite a respectable number of titles both in France and in Spain. The Catalan publishing industry is particularly active and some of the biggest publishing firms of Spain are located in Barcelona. Yet, Catalan books must be content with being anonymously included in the 1,358 titles listed by Spain in 1977 as published in 'other languages'. France does not even give that rudimentary breakdown. Similarly, the United Kingdom does not mention books published in Welsh or Gaelic.

In some cases, even officially recognized languages are poorly represented in the production. In 1978, out of 632 titles published in Ireland, only 80 were in Gaelic and out of 947 titles published in Peru, only 1 was in Quechua.

Sometimes, a widely spoken lingua franca will be sadly neglected, like Mauritius' Creole which accounts for only 1 title out of 20 in 1978. On the other hand, the Netherlands Antilles have set an example: out of 52 titles published in 1977, as many as 19 were in Papiamento, that savoury language of Curaçao in which Spanish, Dutch and English blend with African dialects.

Little mention is ever made of Inuit books for the Eskimos of Greenland and Canada, or of the Navajo, Cherokee, Ojibwe books published in the United States. In fact, there is quite a promising production, especially of children's books, in the native North American languages.

Some countries, and especially socialist countries, pay due attention to publishing in minority languages, but most neglect or simply ignore it.

If such an attitude should persist, it would prove more and more damaging to book development inasmuch as one of the main characteristics of the evolution in recent years is precisely that written communication is extending to more and more numerous and diverse cultural groups.

From this sketchy analysis, one may conclude that the most important modification since 1972 is not the routine increase of the world's book production, but a general trend which includes the accession of small countries to publishing, the diversification of the cultures expressing themselves through books and the demand of more and more new readers. The trend may be too weak yet to be apprehended through global statistics crushed by the weight of the publishing giants, but it is clearly gaining strength every year, a fact which is evidenced by the children's 'book boom' the world over.

3. NEW BOOKS FOR NEW READERS

Out of the 150 million people, both children and adults, who learn to read every year in the world of the early 1980s, about one-third are doomed to relapse into functional illiteracy, another third are likely to become poor readers and only one-third have any chance of becoming habitual readers.

The two main causes of such a situation are the insufficiency and the inadequacy of available reading material. The inadequacy may be economic (the price of books), institutional (the distribution network), physical (the material readability of the printed text), linguistic (the vehicular language) or cultural (irrelevancy of content).

The new readers

An estimate made in 1970 showed that, out of the world's adult population (over 15 years old) which counted about 2.3 billion people, 780 million were illiterate. Out of the remaining 1,520 million literates, 740 million lived in developed countries and 780 million in developing countries. Worldwide school enrolment at the two levels, elementary and secondary, was at that time about 465 million pupils which formed a 'captive public' of compulsory readers. Some 209 million lived in developed countries and 256 million in developing countries. The world's potential reading population could thus be estimated at about 2 billion, out of whom 950 million lived in developed countries and 1,050 million in developing countries. The developed half had a yearly book availability of 474 titles per million potential readers and 6.3 copies per reader. The developing half had to be content with 67 titles per million potential readers and with 0.4 copy per reader.

In 1978, the adult population of the world had grown to about 2.8 billion people. Probably 900 million were illiterate. Out of the remaining 1.9 billion literates, 800 million lived in developed countries and 1.1 billion in developing countries. Worldwide school enrolment was now about 620 million pupils, 240 million in developed countries, 380 million in developing countries. The world's potential reading population was then some 2.4 billion potential readers out of whom slightly more than 1 billion lived in developed countries and slightly less than 1.5 billion lived in developing countries. Yearly book availability was about 506 titles per million potential readers and 9.6 copies per reader in developed countries, while it was about 80 titles per million potential readers and 0.54 copies per reader in developing countries.

Although the number of illiterates is slowly diminishing in percentage (32 per cent in 1978 against 34 per cent in 1970), it is still growing in actual numbers. Thus, the reading population of developing countries has increased by nearly 50 per cent in eight years, the actual increase amounting to at least 400 million new readers.

The average book availability for those new readers has substantially improved, but is still far below standard. An acceptable level of availability would be 200

titles per million readers, and 3 copies per reader. That would mean multiplying the present availability of books in developing countries by 2.6 for the titles and by 5.5 for the copies. In fact, the multiplying factors should be even higher for regions like Africa, an unattainable dream in the near future.

The discrepancy between needs and reality is one of the causes for relapses into illiteracy and for poor reading habits. Adequate follow-up material is indispensable to the acquisition and the consolidation of the reading habit. It is a slow and protracted process, and so when governments in developing countries have to make choices in planning their policies, the obvious priority targets must be children and young adults.

Juvenile literature

The usual classification of 'children's books' in statistics is not satisfactory. A 'children's book' may be anything ranging from a cheap, mass-produced pamphlet of comic strips, to a pocket edition of Jack London, Erich Kästner or Marcel Aymé, from a well-designed, splendidly illustrated and carefully laid out picture book or album to a garbled, clumsily rewritten, hastily printed version of traditional lore. It may also be a camouflaged textbook, more didactic in the dryer sense of the word than culturally enriching.

Juvenile literature is not fundamentally different from so-called adult literature. It is only submitted to a number of supplementary constraints among which a special care for intelligibility, material readability and for the narrative interaction of text and illustrations. Indeed, in many cases, books supposedly intended for children will serve as efficient reading material for new or inexperienced adult readers. Books have often found their way into non-reading families through the reading material brought home by children or adolescents. One must not minimize either the part played in that propaganda effect by school textbooks, often the only representatives of the written word in poorer households.

Allowing for incomplete statistics, one may admit that about 40,000 titles of children's books are published or republished every year in the world, including about 15,000 pamphlets. That represents about 6 per cent of the world's production in 1978. The percentage was about 5 per cent in 1970. But these figures in no way account for the actual revolution that has occurred in the world of children's books during these eight years. New important publishers have appeared among developing countries, the main two being Brazil and the Republic of Korea. Not counting them, 16 developing countries for which reliable data exist, published 1,509 titles in 1978 against 1,307 in 1970, a not insignificant advance of 15.5 per cent.

But among big producers, the changes are much more spectacular. Some of them have their speciality: for instance, Belgium for its high quality 'bande dessinée', France for its juvenile paperbacks and its illustrated albums often written by well-know authors, Great Britain, Japan and most socialist countries for their carefully designed picture books. Industrialized, mass-produced comics often helped by television or cinema productions, which most often originate in the U.S.A. and Japan, are being confronted with the competition of more and more elaborate national production.

The result is a complete reshuffling of the hierarchy between major producers, as is shown in the following chart:

Children's book production (Number of titles)	1970	1978
4,000-5,000		1. France
3,000-4,000		2. USSR (77)
2,500-3,000	1. U.S.A. 2. Japan 3. USSR	3. U.S.A. 4. Japan 5. United Kingdom (77) 6. Federal Republic of Germany
2,000-2,500	4. United Kingdom 5. Federal Republic of Germany 6. France	7. Brazil
1,500-2,000	7. Spain	8. Spain (77)
1,000-1,500		9. Belgium 10. Denmark 11. Republic of Korea
500-1,000	8. Denmark	
Less than 500 titles	9. Brazil 10. Republic of Korea 11. Belgium	

Obviously, the most striking feature of the evolution is the spectacular advance of Belgium, Brazil and France. In the case of France, the figures are not those of the Unesco Statistical Yearbook but those of the French Syndicat National de l'Edition for 1979. The average size of the editions is 15,175 copies per title. A distortion might come from the fact that the category is listed as 'Livres pour la jeunesse' (Books for young people) and not 'Livres d'enfants' (Children's books), and there is an important shade of meaning between juvenile literature and children's books. The breakdown shows that there are 2,204 albums or picture books, 2,083 actual books and 652 'bandes dessinées'. The first category is undoubtedly intended for children. Allowing that one-third of the other two categories might be listed as adult literature in some countries, France's production would still be above 4,000 titles.

The Brazilian jump is less intriguing than the French one because it corresponds to a change of scale of the whole range of book production (from 6,392 titles in 1970 to 20,025 in 1976) but it may be even larger as the figure used here corresponds to 1976, while for France the figure used was that of 1979. The important fact, however, is that children's books which represented 4.3 per cent of Brazilian production in 1970, represented 12.1 per cent in 1976.

The percentage of children's books to total production is an important indicator. It is fairly stable and shows which countries have a long-term policy directed towards young readers.

The following table shows the percentages of titles and copies (when available) in the countries for which children's books are more than 10 per cent of total production:

	Titles %	Copies %
France	18.5	19.7
Belgium	14.9	
Cuba	14.4	12.4
Netherlands	13.1	
Brazil	12.1	16.6
Tunisia	11.8	2.6
Malaysia	11.4	9.6
Denmark	11.0	
Israel	10.4	20.8

Three of the countries listed are developing countries, one Latin American, one Asian and one an Arab state. One will note that, in the case of the last two, the percentage of copies is rather low. The size of their editions is rather low too: 9,300 copies per title in Tunisia, 3,800 in Malaysia. In Cuba, on the contrary, the percentage for the copies is higher, which corresponds to the size of the editions, an average of 55,500 copies per title. Large editions for children's books are part of general policy in all socialist countries. The USSR prints an average of 206,800 copies per title, Poland 68,600, Bulgaria 42,500, Hungary 40,100, Romania 28,900 and Czechoslovakia 27,300. Comparatively, the French average of 15,175 is rather medium sized. Still, considering the age-group, French book availability of 6.3 copies a year per child can quite honourably compare with the 10.3 of the USSR.

Apart from the countries which have been named, progress has been made in quite a number of Latin American countries such as Argentina, El Salvador, Panama and Mexico where, in recent years, systematic efforts have been accomplished. Some Asian countries, as for example, Thailand, Singapore and India are also achieving progress. In Africa and in the Arab states, the situation is less encouraging. Apart from Tunisia, fair results have been obtained in Egypt, Kenya, Mauritania, Nigeria, Senegal, Sudan and Tanzania, but in all those countries, good children's books acceptable for the regional market are sadly lacking, especially in the vernacular languages.

Books for new literates

Apart from the children from pre-school age to adolescence who are a priority target, provisions must be made for two more categories of readers:

(1) adult new literates, especially in developing countries;

(2) reluctant readers who are not habitual book buyers and who may have recently acquired the reading habit and are all the more vulnerable.

Up to a certain point, the readers of the second category have been dealt with through the 'paperback revolution', at least in a limited number of countries, not necessarily the most developed, but those which offered a large enough market for low-cost paperback editions. One may admit as a rule of thumb that the price of a paperback must be more or less equivalent to the hourly salary of a skilled worker. The implication is that provision must be made to adapt the very conception of the book to local economic conditions which vary enormously from one national or even local environment to another. Since the mid-1960s in India a shrewed and enterprising publisher has successfully experimented with a local version of the paperback which is still a model. In Latin America, which is a practically homophonic region, and in South-East Asia where the linguistic groups are comparatively very large, the development of the paperback is mainly a problem of initiative, both commercial and political. But in other regions like the Middle East and Africa, there still remains to solve the difficult problem of cheap and abundant high quality reading material for small or isolated linguistic minorities. Indeed, publishing for minorities is more and more of a challenge even to developed countries.

Ever since the beginning of Unesco's book development efforts, the provision of reading material for new literates has been one of the leading preoccupations. This concern which applies to both categories of new readers, must be continued and diversified, taking into account particularly the conditions of narrative, linguistic and typographical readability in each cultural environment. Research in that field has been conducted in several parts of the world and particularly in some Caribbean countries.

One of the lessons that have been learnt thanks to IBY 1972 is that brains and talent are lacking nowhere in the world and a tremendous impulse has been given to their mobilization in the service of reading. The main obstacles remain those of production and distribution.

The weight of paper

Printing paper is one of the main components of publishing costs and its weight increases with the size of the editions. As shown in a Unesco study on The economics of book publishing in developing countries,[1] for editions of 5,000 copies, it may already represent more than one-half of the manufacturing cost.

As early as the 1960s, the paper situation in the world was deemed by several experts as likely to become a major obstacle to book development in the foreseeable future. A world paper shortage was even predicted for the late 1980s if no adequate measures were taken to adapt the production to a steadily rising demand. No evident symptom of the coming shortage was observable in 1978, but both the production and consumption of writing and printing paper between 1970 and 1978 had increased at a much slower rate than between 1960 and 1970: hardly 40 per cent in eight years as against more than 100 per cent in ten years.

Some alarming symptoms were still present: in 1978, as in 1970, eight countries (U.S.A., USSR, Canada, Finland, Austria, Sweden, Norway, Romania) produced 50 per cent of the world's paper and a still higher percentage of the pulpwood. They are

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1. Datus C. Smith, The economics of book publishing in developing countries, Series: Reports and Papers on Mass Communication, No. 79, Paris, Unesco, 1977.

all highly developed countries and practically exert a monopoly over the world market of paper artefacts which, of course, include books.

On the other hand, the wasteful consumption of writing and printing paper seemed to go on thriving in some parts of the developed world. In 1960, the U.S.A., Canada and Japan consumed 47 per cent of the paper of the world (U.S.A. alone: 38 per cent). In 1970, the percentage had risen to 49 per cent and in 1978 it was well over 50 per cent.

The amount of writing and printing paper consumed in a given region per copy of book published in that region is an extremely significant indicator. The following table provides this information in kilograms for 1970 and 1978:

	1970 (kgs.)	1978 (kgs.)
Developed countries		
Europe	3.3	4.3
U.S.A. and Canada	8.1	10.1
USSR	0.7	0.7
Japan	5.0	5.0
Other countries	6.3	5.9
Developing countries		
West Asia	4.9	2.9
South-East Asia	5.4	3.8
China	(not available)	0.6
Latin America	5.1	4.8
Africa	5.0	4.5
Other countries	1.7	4.5
World	4.2	4.9

Even before 1970, the main victim of the imbalance of paper consumption seems to have been Western Europe where the rising price of paper already had a detrimental effect on the book market. Even if there is a modest rise in the ratio per copy, it still remains under average. European paper consumption which represented 36.6 per cent of the world's production in 1970, amounted only to 34.2 in 1978. Socialist countries such as the USSR and China remain remarkably stable. Practically all the other countries register a drop in the ratio.

Nevertheless, one will note that developing countries seem to fare rather better than Europe. Of course that is partly an illusion due to their poor book production and their use of other kinds of documents. But, curiously enough, their evolution seems to run counter to the general European trend. In 1960, when decolonization was in full swing, the paper consumption of developing countries hardly reached 8 per cent of the world's production. It was 9.5 per cent in 1970 and nearly 11 per cent in 1978. Not counting China, the developing countries consumed about 1 million metric tonnes of paper in 1960, 2.5 million in 1970 and nearly 4 million in 1978.

Another and still more important fact is that such progress, however modest, has been achieved through an increase in national production. Only a few developing

countries are self-sufficient, but they are much more numerous in 1978 than in 1970. In those eight years, the number of countries producing more than 80 per cent of their consumption rose from 5 to 8 in Latin America, from 7 to 11 in Asia, from 4 to 7 in Africa. The case of Africa is particularly interesting: while its consumption increased by 12.5 per cent between 1970 and 1978, its dependence on importation dropped from 84 per cent to 55 per cent.

The problem is that, be it imported or locally produced, paper is increasingly expensive. In 1977,[1] the paper cost per copy was 50 US cents in Africa, while it averaged 24 cents in the whole developing world. In the Middle East, it was 31 cents. The result is that in both these regions a 1,000 copy edition cannot reach the 'breakeven' point and has to be sold at a loss. The difference with other regions levels out for larger editions, but everywhere the 'breakeven' point remains very high and the margin of profit hardly sufficient for new investments.

Manufacturing cost

Datus C. Smith Jnr.'s study shows that for a region like Africa, composition and presswork are the heaviest burdens, and that the smaller the edition, the heavier the burden. For editions of 1,000 copies, they total 74.8 per cent of the manufacturing cost. For editions of 5,000 copies they total 55.2 per cent and for editions of 10,000 copies they still represent 44.6 per cent. Understandably, there are more small editions than large in Africa where the average size is hardly more than 6,000 copies.

The weight is less impressive in other regions, but it is still very heavy: for editions of 5,000 copies it is 52.4 per cent in Latin America, 34.3 per cent in Asia and 30.7 per cent in the Middle East. Added to the paper effect, the consequence of such a situation is that, as the size of the editions increases, the cost of manufacturing per copy decreases much more slowly in developing countries than in developed countries: for 10,000 copies it represents 44 per cent in the developing countries and 21 per cent in the developed countries.

Obviously, then, one must be very careful in choosing the method used for composition and for presswork in developing countries: useless expenses cost twice as much as in developed countries. One might think that the new sophisticated methods for printing are less costly than the old bulky equipment necessary for hot printing (linotype plus letterpress), which they certainly may be in highly developed countries. But then, one must take into account the fragility of the equipment, its susceptibility to extreme climates, the possibility of repairing or replacing parts locally, the level of training and of education of the operators. In fact, in Asia, for editions of 5,000 copies, the simplest method of typewriter plus offset costs 4.5 per cent more than conventional hot printing. For editions of 1,000 it is 16 per cent more expensive in Asia, 9 per cent more in Africa and 2.5 per cent more in the Middle East. On the other hand, typewriters and composition machinery are not easily available or even existing in many of the Asian scripts which are often syllabic and involve many more characters than the Roman alphabet. There is a special problem for the Semitic languages like Arabic or Hebrew whose alphabet does not include the short vowels. Expert readers can manage, but new readers do need diacritical signs which are not easily included on a keyboard. Worthy efforts are made to include the vowels as separate characters in Arabic, but the project is still at an experimental stage. Romanization, as it is practised in China, is another solution, but it will not fit any type of phonetic system. In Africa, while the Roman alphabet seems to fit perfectly Bambara or Swahili, a language like Ewe needs quite a number of additional

1. Ibid.

characters. Some governments have been somewhat unmindful of the problem when they decided to transcribe national languages which had hitherto been oral: too learned a transcription may prove incompatible with mechanical composition.

Hand composition is sometimes the only solution. In Asia and Africa, it is only slightly more expensive than linotype. In some cases, particularly for Urdu which uses the Arabic script, publishers have successfully resorted to the hand of calligraphers coupled with offset.

Binding is also a problem. Stapling is by far the most economical solution although, in some cases, the so-called 'Perfect' binding which consists of coating the back side of the book with plastic, may be even cheaper, its main defect being its vulnerability to climatic conditions.

The conclusion is that there is not one ideal solution applicable to all regions and all countries. The lesson, however, must be drawn that the mere importation of equipment from developed countries may very often raise as many problems as it solves. Training personnel, giving expert advice, discussing local problems with a locally minded approach are some of the tasks that the Book Centres of Bogotá, Tokyo and Yaoundé and the Unesco Regional Office in Karachi have been carrying out with some success. But their action will be lastingly efficient only if proper decisions are made by the governments of the countries concerned in order to allow initiative, public or private, to solve its own problems independently of the interferences or pressures, however well meaning, which may be exerted, often unmindfully, by the developed countries.

The book trade

The book trade begins with a raw material which is unlike any other: an author's brain. The price of the 'grey cells' has never been very high and few writers even in developed countries can afford to be full-time authors and live on their production. Indeed, some people write for glory or simply out of a sense of duty to their community, but no sizeable and valuable intellectual production of books can exist if authors do not receive a reasonable reward for their work.

In many developing countries, the author does not receive any reward at all or, if any, a lump sum whose amount is often a mere token. It is true also that an increasing number of publishers in developing countries do pay royalties and even advance royalties which may range from 5 to 15 per cent of the list price. Even so, the comparatively small size of the editions yields incomes which, compared to time spent in writing, is far inferior to any vital minimum. The temptation is great for authors to attempt publication in a more developed country or to seek a more lucrative occupation. In such cases national cultural development is penalized. The situation is aggravated by the fact that, when editions are large enough, it may prove more profitable for the publishers to use translated material than original local sources.

The solutions traditionally offered to cope with the authors' problems are hopelessly inadequate. No courses in creative writing will awaken talents where the demands of physical survival are not met. Prizes and awards may be an enticement, but they favour, sometimes unduly, a handful of talents where armies of them are needed. One might be tempted to suggest that the national community should provide for the maintenance of writers by giving them a minimum allowance so that they can freely develop a creative career. But experience shows that no government is wise enough not to turn that cultural duty into a means of political control. On the other hand, how is one going to be recognized as an author worthy of subsidy? Professional associations or writers' unions have certainly obtained positive results in that field in many socialist countries, for example, but the risk exists of rewarding conformity and discouraging experimentation.

One measure at least seems both feasible and necessary. It is a fair and reasonable legislation for the protection of authorship. Fairness implies that national laws and international agreements must understand copyright as being the right of the author as well as that of the publisher, which is not always the case. Both must be considered as equal partners in a joint enterprise and the intellectual investor must get his dividend just as the financial investor. Indeed, co-operative publishing has sometimes been successful.

On the other hand, reason demands that such legislation be applicable. There is no profit to be drawn by anybody if the market does not allow it. The defence of writers depends primarily on a good and efficient distribution network able to meet the needs of a sufficient reading population. It might be a good idea for governments to procure some supplementary income to writers by employing them in literacy campaigns or for the promotion of the reading habit.

Authors and booksellers are natural allies and so are librarians. The distribution network is the very core of any book development system. It is also one of its more vulnerable components.

The developed countries have evolved a complicated system of book distribution. It includes wholesale distributors (who may be publishers themselves) feeding books on demand to booksellers or systematically to predetermined sales-points. More and more chain stores manage directly their book departments. There are also book clubs, mail order bookselling companies and door-to-door vendors.

It would be absurd for developing countries to copy such a system which implies heavy overheads and requires an elaborate infrastructure. Very often, there is no intermediary between the publisher and the bookseller. Sometimes they are one and the same. One must then think in terms of sales-points more than in terms of actual bookshops. Most of the shops which bear that name are either located in the luxury districts of urban areas and cater to a moneyed, often foreign, minority, or live on other kinds of trade among which bookselling is only a sideline.

The real problem is what the Mexicans call the 'marginalization' of urban or rural areas. In the poorer of these, the only reading material available (if any) is to be found in pavement or market stands in the shape of second-hand comics, magazines or worn-out textbooks. Business is brisk in these 'parallel' distribution circuits and old printed paper is imported by the hundreds of tons into some African countries. In urban areas, especially in Asia and Latin America, news-stands usually offer cheap books and pamphlets. So do news-boys in some of the bigger cities: the 'voceadores' of Mexico City form a redoutably organized and controlled corporation.

No one single method can cope with the problems of book distribution in developing countries. In India, the Home Library Club system has been applied with great success. By extending a vast network of sales-points and correspondents over the rural areas of Uttar Pradesh, a Delhi paperback publisher has been able to achieve unheard of sales. Home Library Clubs have been tried with success in some other countries.

Another and quite different system was applied by the Mexican Government in the late 1970s. The idea was to use the half million schoolteachers as propagandists for reading and intermediaries for book distribution. An extremely well-documented information bulletin offering for sale more than 100 books in each issue was mailed to them monthly. The success of the 'Operacion Maestros' was due to the co-operation of the publishers who accepted to offer for sale, books whose price was compatible with the economic conditions of the prospective readers and whose content was relevant to their needs and tastes.

In other countries, an effort has been made to promote all the branches of the book trade at the same time. Cuba, in that respect, is an example. In fact, the distribution system is so efficient that production cannot always keep pace with its demands, not too uncommon a situation in socialist countries. Even in market-economy countries, the intervention of the government is necessary, especially when the number of potential readers is insufficient to allow profit-yielding editions. It has been suggested to establish 'cultural bases' with trained personnel able to deal with books as well as with the other means of culture and communication. Brazil has experimented with the system with some success.

Such bases must, of course, include a lending library. Libraries remain the nightmare of book distribution as well as the dream of publishers who see in them an ideal 'captive' market.

It is a dream for the time being. All the libraries of sub-Saharan Africa acquire yearly probably more than 500,000 volumes and certainly less than 1 million, i.e. about the equivalent of the acquisitions of the British Library. Ghana with 929,000 volumes in 7 public libraries, and Nigeria with 891,000 volumes in 31 public libraries, seem to have been in 1977 the only African countries with an acceptable library service. Among the former French possessions, Madagascar ranks honourably with 134,000 volumes in 20 public libraries.

In Asia the countries with a good library service are Hong Kong (230,000 volumes in 8 libraries), the Republic of Korea (949,000 volumes in 110 libraries), Malaysia (880,000 volumes in 16 libraries), Sri Lanka (727,000 volumes in 381 libraries), Thailand (586,000 volumes in 526 libraries) and particularly Viet Nam (4,879,000 volumes in 316 libraries).

In the Arab states the figures are less encouraging. Even when the number of volumes is high, there are few public libraries except in Egypt (980,000 volumes in 161 libraries) and in Iraq (195,000 volumes in 24 libraries). Small Kuwait is doing well with its 258,000 volumes in its one public library.

In Latin America, the only countries which stand out are Mexico (2,777,000 volumes in 1,084 libraries), Argentina (9,532,000 volumes in 1,528 libraries) and Brazil (12,665,000 volumes in 2,332 libraries).

Many developed countries fare hardly better. France, for example, has only 48,661,000 volumes in 1,026 public libraries compared with Romania with 55,559,000 volumes in 6,420 libraries and Poland with 81,870,000 volumes in 9,128 libraries.

Computerization may help develop national, university and specialized libraries, but for public libraries, precisely those which have the most direct influence on the reading habits of a country, nothing can replace books. It has been calculated that the investment needed for a medium-sized library computer service can buy from 75,000 to 100,000 books. Governments should certainly bear that in mind when making their budget choices. It means that, without checking the march of progress or impairing the future of the industry of electronics, a very small percentage of the investments could significantly improve what governments should consider as a public service utility needed to create new readers.

4. THE NEED FOR RESEARCH

The fact that the trends which this survey reveals are not altogether negative certainly does not allow one to consider the overall situation as encouraging, but

they do show that much could be achieved if all countries were determined upon having a carefully planned and co-ordinated book policy.

The basic requisite for such a policy is organized research based on a truly reliable scientific background. The applied science of books and reading, which is called 'bibliology' in some countries, has achieved tremendous progress in the last twenty years. During that period, hundreds of surveys concerning book production, distribution and reading habits, have been conducted the world over. Well-tested methods, experiment-backed theories are available everywhere. The only requirement to obtain workable data is co-operation with trained specialists. Nowadays, most universities can have a communication department, however small, including at least one specialist in printed communication.

The fact is that the statistical data available to Unesco are still often scanty and unreliable. Those which were used in this study have been carefully evaluated, verified and even corrected to the best of our knowledge. The lack of systematic data-gathering in some government agencies dealing with such vital facts as those related to book development, is exemplified by the way some statistics are prepared. For instance, when required to state the number of copies printed in their countries, some officials simply multiply the number of titles by an arbitrary figure regardless of the year or U.D.C. class. The improvisation and lack of rigour in some highly developed countries result in equally misleading information.

Non-statistical data can be more reliable. The difficulty is that they often reflect a biased outlook or a narrow professional or national point of view.

To give an example, an expert related to the publishing industry of a highly developed country may consider that the needs of a given African country are satisfactorily met if a steady flow of textbooks and functional books in one of the great international vehicular languages (preferably his own) is supplied to that country at reasonable prices. On the other hand, an African expert more concerned with the cultural, social and political aspects of national development may consider that such a supply is in fact a hindrance to the satisfaction of the true needs of his country, which primarily include a local publishing industry able to produce and distribute original books in the vernacular languages.

Similar distortions will occur when the expert is too much of a librarian, a documentalist, an educator, an author or a connoisseur in literature. In fact, it is doubtful whether any consensus can be reached between too strictly professional experts, not only for the assessment of situations, but merely for the statement of facts. Hence the necessity of creating academic research facilities which can provide objective, scientific information.

An efficient book policy cannot be improvised. That is one of the lessons Unesco has been trying to teach, with some success in many cases, less satisfactorily in others.

Books are artefacts that are manufactured and sold in quite a variety of social and economic systems. They are economically linked to many other industries. They command employment and profit in many sectors of national and international activities. They are extremely vulnerable to poverty and general lack of development. They are given a very low priority as compared with survival commodities.

On the other hand, they are irreplaceable agents of education, culture and development. The effect of the new technologies of communication has been to increase, not diminish, the thirst for reading and the vital need for books.

Another and less often voiced aspect of books is that they are privileged agents on the one hand of power, influence and control, and on the other, of freedom and opposition. They not only convey ideas, but, through the unique critical process of written communication, they awaken ideas, they provoke thoughts, they help consciences to mature. Some may be tempted to use them as means of domination but the counter-effect of reading has always defeated this purpose.

This multifaceted nature of books makes it very difficult to elaborate a generally accepted book policy. Governments have their own views, but so have profit-making industrialists, professionals, librarians and educators, authors thirsting for expression, religious or ideological groups struggling to spread their creeds and readers eager to learn, escape, dream, improve their minds or strengthen their grip over their environment.

International Book Year 1972 provided an opportunity for speaking out on behalf of books. It is once again time for all those concerned with books to meet, to discuss with one another and to examine the facts together in an effort to contribute new ideas and solutions to the problems now facing the book professions.